

# State of North Carolina Editor User Training Publishing Checklist

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# Overview

The goal of this “Publishing Checklist” is to outline the content management options Editor and Publisher users should consider before submitting or approving content to be published. This checklist serves as an addendum to the Editor User Guide, meant to help Editor users learn how to create and manage content in the new Drupal platform. Some of these features and options are beyond the permission levels of a basic Editor user.

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## Reviewing Content

When you create a new node, there are a limited number of required fields on each content type that must be populated before you are able to save (e.g., “Title”). In addition to these required fields, there are optional fields that allow you to provide more information about the content, which contributes to better organization of content on the site. Below are individual field recommendations that should be considered either before an Editor user submits content, or as a Publisher (or Admin) user is reviewing content, to be published.

## Meta Tags

Meta tags are structured information about a node that contribute to search engine optimization (SEO). This means that certain data provided about an individual piece of content will help surface that content when users search for it.

Each node in the Drupal CMS has a series of metadata fields within the “Meta tags” tab. This tab only displays to permissioned users (currently, Publisher users and Admin users; it does not display to Editor users). The Drupal system has the following “Meta tags” defaults in place:

- **Page title:** [node:title] | [site:name]
  - [node:title] is pulled from the content entered in the node’s “Title” field



- [site:name] is pulled from the official name applied to the site (this is set by a Site Manager user or an Admin user)
  - Example: The default “Page title” metadata attributed to the “Arts” Landing Page node on DCR is “Arts: North Carolina Department of Cultural Resources”
- **Description:** [node:summary]
  - [node:summary] is pulled from any content entered in the “Summary” field of the node
    - The “Summary” content will display as a description of the node in search results

<b>URL path settings</b> Automatic alias	Configure the meta tags below. Tokens, e.g. "[node:summary]", automatically insert the corresponding information from that field or value, which helps to avoid redundant meta data and possible search engine penalization; see the "Browse available tokens" popup for more details.
<b>Meta tags</b> Using defaults	
<b>Authoring information</b> By ncpublisher	
<b>Publishing options</b> Current: Draft	
<b>Page title</b> <input type="text" value="[node:title]   [site:name]"/>	
The text to display in the title bar of a visitor's web browser when they view this page. This meta tag may also be used as the title of the page when a visitor bookmarks or favorites this page.	
<b>Description</b> <input type="text" value="[node:summary]"/>	
A brief and concise summary of the page's content, preferably 150 characters or less. The description meta tag may be used by search engines to display a snippet about the page in search results.	
<b>Abstract</b>	

## Overwriting Default Meta tags

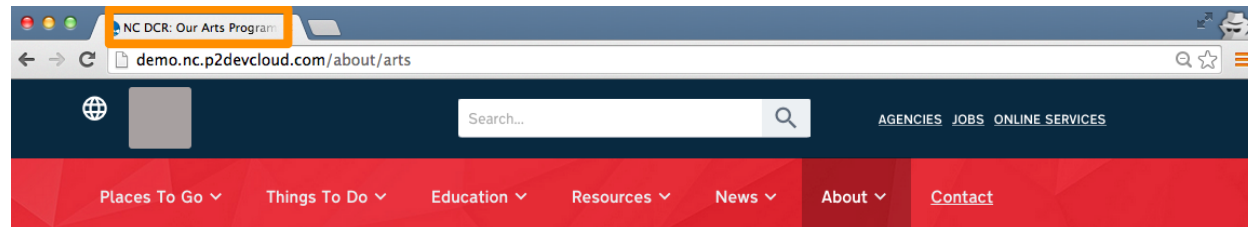
A user who has access to the “Meta tags” fields is able to overwrite the defaults with other information. This allows individual content creators across all agencies within the new NC platform to conform to standardized metadata naming conventions, resulting in a consistent theme.

Instead of relying on Drupal's default “Page title” and “Description” conventions, a user is able to populate “Meta tags” fields with more specific content. Using the aforementioned “Arts” Landing Page node from DCR as an example, a user could adjust the “Page title” and “Description” content as seen below:

<b>Menu settings</b> Arts	Configure the meta tags below. Tokens, e.g. "[node:summary]", automatically insert the corresponding information from that field or value, which helps to avoid redundant meta data and possible search engine penalization; see the "Browse available tokens" popup for more details.
<b>URL path settings</b> Alias: about/arts	
<b>Meta tags</b> Page title: NC DCR: Our Arts Programs Description: Through the N.C. Arts Cou...	
<b>Revision information</b> No revision	
<b>Comment settings</b> Closed	<b>Page title</b> <input type="text" value="NC DCR: Our Arts Programs"/>
<b>Authoring information</b> By admin on 2015-03-20 12:28:57 -0400	
<b>Publishing options</b> Published	
The text to display in the title bar of a visitor's web browser when they view this page. This meta tag may also be used as the title of the page when a visitor bookmarks or favorites this page.	
<b>Description</b> <input type="text" value="Through the N.C. Arts Council, the N.C. Symphony and the N.C. Museum of Art, we jumpstart economic development and offer North Carolinians of all ages the opportunity for life-changing arts experiences."/>	
A brief and concise summary of the page's content, preferably 150 characters or less. The description meta tag may be used by search engines to display a snippet about the page in search results.	



Note that the content entered in the “Page title” metadata field affects what displays in a site visitor’s browser tab.



## Image Alt Tags

Images can be uploaded to the system via the WYSIWYG editor’s iMCE module, as well as through various “Photo” and “Main Image” fields across different content types. When an image is uploaded or referenced, a user has the option of adding “Alternate text” and “Title” data to the image.

A screenshot of a form for editing an image. The form has a title 'Main Image'. Below it is a preview of the image, which shows a person's hands writing on a document with a sign that says 'Auditor'. To the right of the preview is the filename 'cta-audit-istock.jpg (86.15 KB)' and a 'Remove' button. Below the preview is a section for 'Alternate text' with a text input field containing 'State auditors review state agencies and state money.' and a note: 'This text will be used by screen readers, search engines, or when the image cannot be loaded.' Below that is a section for 'Title' with a text input field containing 'NC State Auditors' and a note: 'The title is used as a tool tip when the user hovers the mouse over the image.'

These field options allow you to provide a description of the contents of an image file. This description provides text for site visitors who cannot see images in their browser (i.e., visitors using browsers that cannot display images or have image display disabled, visually impaired visitors, and visitors who use screen readers). If a site visitor can see images, the image’s “Title” tag will also show when the visitor hovers over the image.



Adding alt tags to images is one way to bring new visitors to your site. Images with alt text help improve your site's placement in search engine results because the alt text allows the images in your content to rank in image search results.

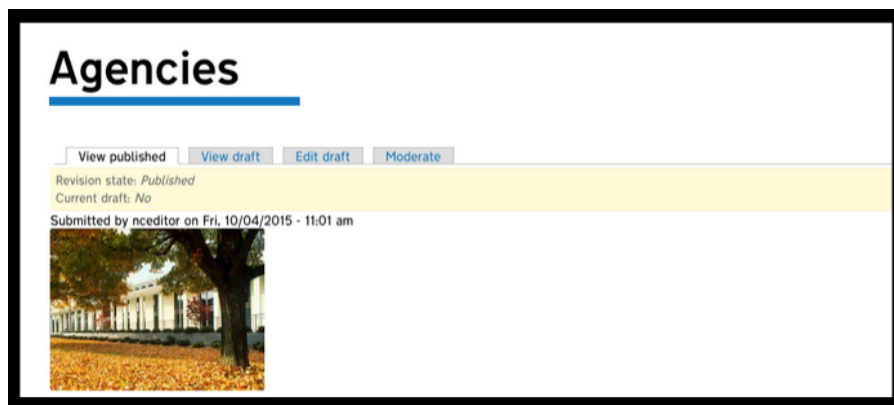
Effective alt text attributes should convey the same contextual information that a visual user would see if the image displayed. Important things to consider when describing an image include:

- Keep the description simple
- Be descriptive but succinct
- Consider the placement of the image & the text surrounding the image

## Menu Placement & Management

### Node Management

When an authenticated user is looking at the detail view of a saved node, a user can select from several tab options (based on the node type & the user's level of permissions) that help manage the node:



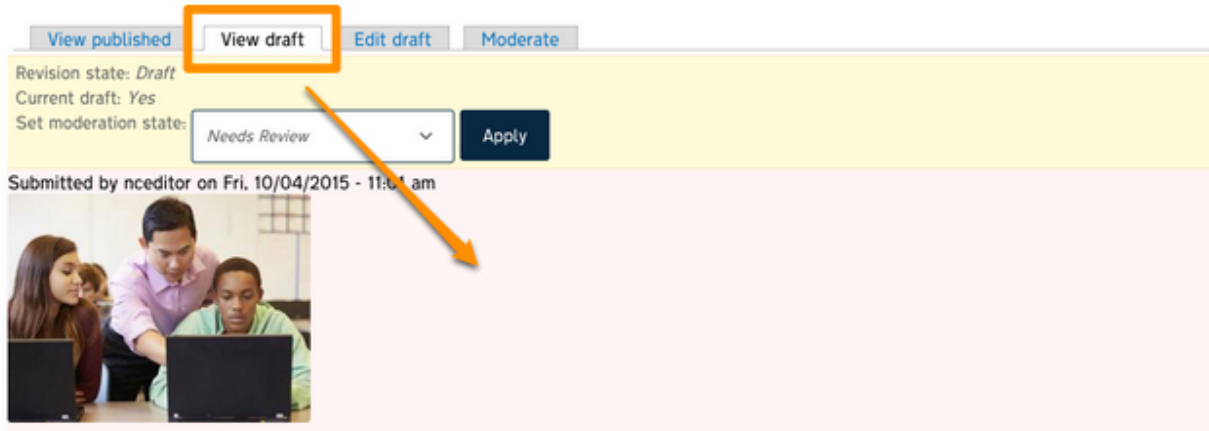
- **View published:** To view the most recently published version of a node; once a node is saved as “Published”, an Editor user is able to create a new draft (so long as the content is owned by an Editor user); this “View published” option will not appear if this is brand new content
- **View draft:** To view an in-progress draft version of the content; this option will not appear if there is no draft
- **Edit draft:** Content is presented in its form for you to update
- **Moderate:** To jump to a screen dedicated to showing the (Workflow) moderation history of the content item

### “Draft”/“Needs Review” vs. “Published”

Once a node is published, a user with proper permissions is able to make edits to the node. After a new draft of a published node has been saved as either “Draft” or “Needs Review”, Drupal adds a pink background to the draft version of the published node. Note the pink background that displays on an in-progress draft view of a saved node:



# Agencies

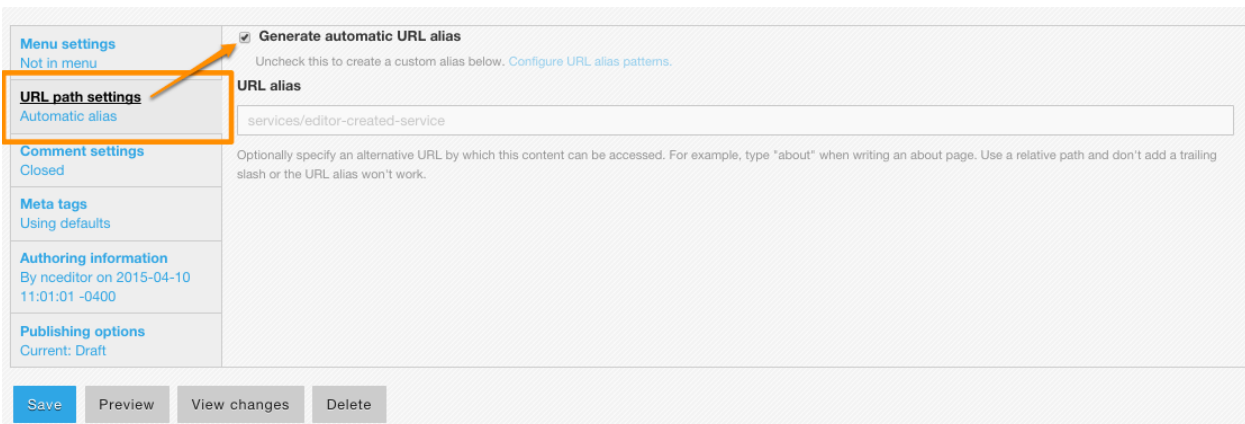


This pink background is removed as soon as a user with the appropriate permissions moderates the draft version of the node to the “Published” Workflow state.

The “View draft” tab also presents Editor users with the ability to immediately moderate content from “Draft” to “Needs Review” by using the dropdown menu and selecting “Apply”. This feature is a simpler option than selecting the “Edit draft” tab, selecting “Moderation state > Needs Review” from the “Revision information” field on the edit view, and then saving).

## URL Path Settings

Drupal creates “friendly” relative URL paths, making it easier for site visitors to find content. The default URL path settings, set as [node:type/node:title], are applied to each piece of content (indicated by the “Generate automatic URL alias” checkbox with the “URL path settings” tab).



Users who have access to the “URL path settings” tab on a node’s edit view are able to overwrite a node’s default path. This is one way of controlling the structure of site content.



<b>Menu settings</b> Not in menu	<input type="checkbox"/> <b>Generate automatic URL alias</b> Uncheck this to create a custom alias below. <a href="#">Configure URL alias patterns.</a>
<b>URL path settings</b> Alias: services/editor-created-service	<b>URL alias</b> <input type="text" value="services/editor-created-service"/> Optionally specify an alternative URL by which this content can be accessed. For example, type "about" when writing an about page. Use a relative path and don't add a trailing slash or the URL alias won't work.
<b>Comment settings</b> Closed	
<b>Meta tags</b> Using defaults	
<b>Authoring information</b> By nceditor on 2015-04-10 11:01:01 -0400	
<b>Publishing options</b> Current: Draft	

## Finding a Node's ID Path

In addition to Drupal's default friendly path, each piece of content in the system is assigned a unique number ID that can be used when referencing the content item. To find the node number of any given content item:

- Select **Content** from the toolbar
- Click the title to open a node's saved/published view
- Hover over either the **Edit draft** or **New draft** tab
- Find the screen display showing the URL of the hover link

The screenshot shows a Drupal node page for 'Editor-Created Service'. The 'Edit draft' tab is highlighted with an orange box. An orange arrow points from this tab to the URL 'node/348/draft' in the browser address bar. The page also shows the 'Description' section with a heading 'Description' and a paragraph of text.



## Menu Settings

While Site Manager users and Admin users are able to control the items in a site's main menu structure, users with the proper permissions are able to place individual nodes in the menu directly from a node's edit view via the "Menu settings" tab.

**Menu settings**  
Not in menu

☐ Provide a menu link

**URL path settings**  
Alias: services/editor-created-service

**Comment settings**  
Closed

**Meta tags**  
Using defaults

**Authoring information**  
By nceditor on 2015-04-10 11:01:01 -0400

**Publishing options**  
Current: Draft

Save Preview View changes Delete

Once the "Provide a menu link" checkbox is enabled, a list of field options appears. To place a node in the menu structure:

- In the **Menu-link title** field, add the text that you want to display in the menu
- Use the **Parent item** dropdown list to select the menu item where you want the node to live
  - Note: Selecting the default "<Main menu>" option will place the node as a parent item in the main menu navigation

**Menu settings**  
Locations

☒ Provide a menu link

**Menu link title**  
Locations

**Parent item**

- ✓ <Main menu>
- Cultural Resources (disabled)
- Places to Go
- Archives
- Cultural Trails
- Historic Sites
- Coast
- East
- Metrolina
- Triangle/Triad
- West
- Libraries
- Government and Heritage
- Library for the Blind and
- Museums
- North Carolina Museum of Art
- Southeastern Center for
- North Carolina Museum of
- Mountain Gateway Museum
- Museum of Cape Fear
- Museum of the Albemarle
- North Carolina Maritime
- Venues for Rent
- Business
- Filming
- Weddings/Parties

A node must be published in order to appear in the site's menu structure. An unpublished node that remains in "Draft" or "Needs Review" Workflow state will not display in the site's menu structure.





## Breadcrumbs

A node's "breadcrumb trail" refers its location within the site's menu structure. The NC platform applies preformatted theming to a node's breadcrumb trail, helping users navigate the site. Breadcrumbs are related to a node's relative URL path, a user-friendly feature of Drupal; the URL path spells out the content's location within the system.

- Example: The Site Page <http://demo.nc.p2devcloud.com/about/support-dcr> indicates that the "Support DCR" node is a child of the parent node, "About"
- More Complex Example: The Webform node, "DCRTV RSVP for Individuals" is a child of the "Cultural Resources TV" Site Page, which is a child of the "Education & Learning" Landing Page (<http://demo.nc.p2devcloud.com/education-learning/cultural-resources-tv/dcrtv-rsvp-individuals>)
  - Explained another way:

Menu Weight & Level	Item
First - Parent	Education & Learning
Second - Child	Cultural Resources TV
Third - Grandchild	DCRTV RSVP for Individuals

The breadcrumb trail is displayed with a special treatment at the top of every node. Higher weighted menu items are hyperlinked, and the current detail node is plain text at the end of the trail.

Home » Education » Cultural Resources TV » DCRTV RSVP Individuals **Breadcrumb Trail**

View Edit Webform Results Clone content Devel

**Name \***

Please enter your full (first and last) name.

**Education**

[Educator Portal](#)

A node's breadcrumb trail brings attention to the importance of keeping node titles succinct. A lengthy node title will potentially corrupt the theming applied to the breadcrumb trail, which could lead to disrupting a site visitor's overall site experience.

